

CLAIMS

- 1 1. A method comprising
2 displaying to a user a circular visualization element having
3 sectors arranged around a center of the element, the sectors
4 respectively corresponding to different groups of assets,
5 in each of the sectors, displaying an array of visual elements
6 representative of respective assets belonging to the group to which
7 the sector corresponds, the visual elements being arrayed with
8 respect to distance from the center in accordance with magnitudes
9 of performance of the assets during a recent period.
- 1 2. The method of claim 1 in which the visual elements
2 comprise displayed dots, one for each of the assets.
- 1 3. The method of claim 1 in which the visual elements exhibit
2 visible characteristics that correspond to categories of the assets
3 within the group.
- 1 4. The method of claim 3 in which the categories of the assets
2 within the group correspond to different capitalizations.
- 1 5. The method of claim 2 in which dots are arranged along a
2 radius of the sector to which they belong.
- 1 6. The method of claim 5 in which dots that would otherwise
2 lie on the radius at a given distance from the center are displayed at
3 different angular positions near to the radius.

Attorney Docket 11910-003001

7. The method of claim 1 in which the sectors have angular extents that represent the fractions of the total number of asset items represented by the respective sectors.

8. The method of claim 1 in which the circular visualization element is subdivided into rings having respectively different distances from the center.

9. The method of claim 8 in which the rings are displayed in different colors.

10. The method of claim 1 in which the magnitudes of performance of the assets are measured in percentage price change.

11. The method of claim 1 in which the recent period comprises a trading day on an asset market.

12. The method of claim 1 in which the assets comprise securities issued by corporations.

13. A displayed visualization element that is circular,

has sectors arranged around a center of the element, the sectors respectively corresponding to different groups of securities issued by corporations,

in each sector, has an array of dots representing respective securities belonging to the group to which the sector corresponds, each of the dots lying on or near a radius of the sector and each having a distance from the center along the radius that corresponds

10 to the percentage change in the price of the represented security
11 during a trading day, and

12 has differently colored rings at respectively different distances
13 from the center.

1 14. A method comprising

2 displaying to a user a visualization element that indicates
3 the odds of a performance measure of an asset being within
4 specified ranges of identified values of the performance measure at
5 a succession of times in the future.

1 15. The method of claim 14 in which the performance measure
2 comprises a price of the asset.

1 16. The method of claim 14 in which the performance measure
2 comprises a return percentage.

1 17. The method of claim 14 in which the performance measure
2 comprises a tax-adjusted return percentage.

1 18. The method of claim 14 in which the visualization element
2 include stripes superimposed on a graph of the performance
3 measure over time, each of the stripes representing one of the
4 specified ranges.

1 19. The method of claim 18 in which each of the stripes begins
2 at a current time and becomes broader as it extends to future times.

Attorney Docket 11910-003001

Attorney Docket 11910-003001

- 1 20. The method of claim 14 also including
2 displaying a graphical device that shows actual historical
3 values of the performance measure.
- 1 21. The method of claim 20 in which the graphical device that
2 shows actual historical values is a line graph one end of which
3 joins the visualization element at a point which represents a current
4 date.
- 1 22. The method of claim 14 in which the visualization element
2 includes two portions, one of the portions representing the odds
3 prior to a specified date based on one assumption, the other of the
4 portions representing the odds after the specified date based on
5 another assumption.
- 1 23. The method of claim 22 in which the specified date is a
2 date on which tax effects change from the one assumption to the
3 other assumption.
- 1 24. A method comprising
2 displaying to a user a visualization element having
3 graphical indicators of the relative performance of a selected asset
4 compared with the performance of groups of assets in each of a
5 succession of time periods, each of the groups comprising assets
6 representing a common style.
- 1 25. The method of claim 24 in which the style comprises a
2 class of investment objectives.
- 1 26. The method of claim 24 in which the relative performance
2 is determined using an asset class factor model.